



Unite Carers in Mid Devon

ANNUAL REPORT

1ST APRIL 2021 - 31ST MARCH 2022

Unite Carers is a Company limited by Guarantee

Charity Number: 1099188

Company Number: 4779388

2 Bridge Street, Tiverton, Devon EX16 5LY

Telephone No.: 01884 257511

e-mail: info@unitemd.org.uk

Website: www.unite-carersinmiddevon.org.uk

Patron:

Angela Rippon CBE

Unite Carers in Mid Devon

Information and Support for Carers

A Carer is a person of any age who provides regular unpaid care for a friend or relative who cannot manage alone because of severe illness, disability, frailty or vulnerability.

The aims of Unite Carers' Service are:

To promote any charitable purpose for the benefit of unpaid carers who look after someone who depends on them in the Mid Devon community, by the advancement of education, the protection of health and the relief of poverty, sickness and distress; also to ensure that every individual is made aware of the services available to them and is given the opportunity to express their needs effectively, regardless of race, gender, sexuality or disability.

Contact details:

**Unite Carers In Mid Devon
2 Bridge Street
Tiverton
EX16 5LY**

**Tel: 01884 257511
Email: info@unitemd.org.uk**

Office open by appointment.

NEW CHAIR OF TRUSTEES REPORT 2022

In his role as Chair of Trustees, Roy had taken on so many responsibilities that when he announced his intention to step down, the Board were faced with a dilemma.

The appointment of a General Manager had been discussed by Trustees on many occasions over the past 6 years, this was now a serious possibility enabling the reduction of the Chair's work load so a replacement might be easier to find.

The outcome was that Sharon accepted the post of General Manager and I stepped up to Chair of the Board of Trustees, which enabled Roy to step down.

Unite Carers recognise the enormous commitment of Roy Grantham (our now retired chairman) for the past 7 years, Roy worked diligently for the good of Unite we give him our sincere thanks.

Enclosed in this document is Roy's final AGM report and my report also covers the challenging year following Covid.

Restrictions were being cautiously lifted as Unite Carers attempted to get back to normal, and we have been pretty successful in doing this.

Staff continued on reduced hours until 1st June 2021 and worked hard to restore our services by the target date of 22nd June.

Coming back to full time work wasn't easy, picking up where things were left was difficult at times, Covid precautions were practiced at all times. Our staff continue to work hard to expand our services.

All that seems a long way behind us now and despite having to deal with a few tricky hiccups on the way, we have succeeded beyond our expectations.

Our funding applications were fairly successful; despite the testing times we were emerging from.

One of the casualties of Covid was the ending of our Kids Who Care project. This became badly affected by outside influences beyond our control. Consequently, the contract with Westbank was cancelled on 29th November 2021 rendering both Activity Co-ordinator roles redundant.

We cannot rule out the possibility of this worthy project becoming active again in the future.

Continued/....

NEW CHAIR OF TRUSTEES REPORT 2022 (Continued)

Our Adult Support Groups have gone from strength to strength. The support given to carers through group activities is an invaluable part of our work and it is hoped to expand this in the future.

Our 1 to 1 sitting service depended on volunteers going into carer's homes, and with Covid still prevalent this service remains on hold just now. However, we were able to set up our Safe Stop Sitting Service in October, which enables carers to have a couple of hours' respite while their dependant is supervised in a safe place. There is a great need for this type of service and it is hoped that we can expand this to other areas. More information about our groups will be included in staff reports.

In addition to our support groups, Unite Carers continues to provide 1:1 befriending – both face to face and by telephone and we also signpost Carers to other appropriate services.

Inevitably there have been staff, volunteer and Trustee changes throughout the year. We owe a debt of gratitude to all staff, those who have left Unite during the past year and those still with us, they do an amazing job.

Looking ahead, we recognise that the development of our website and other social media facilities must go ahead if we are to communicate effectively with the rest of the world. In addition to our search for volunteers, Trustees and a Treasurer, we add IT expert to our list!

Unite Carers in Mid Devon was established as a charity in May 2003 with the backing of social services and the express purpose of supporting unpaid carers in Mid Devon and giving them a voice. Next year, 20 Years on, we are still recognised as a leading voluntary carer support organisation in our area. We believe in the ethos of social welfare and all that implies and it is to this end that we work.

We also believe in celebrating and so 2023 will be a year for Unite Carers and all those associated with us past and present to celebrate with us and to remember Carole Benn, the lady who founded our charity, who sadly passed away last year. We are very grateful for the donations received in Carole's memory.

Bernice Philbrick

Chair of Trustees

Ex-Chairman of Trustees Annual Report – Year ending 31st.March 2022

The reason for this report being for less than the complete year in question is that in order to take more of a back seat I resigned as Chair of Trustees of Unite Carers on the 21st February 2022 and as a Trustee on the 14th March 2022.

My time as a Trustee with the charity has been rewarding and I hope served some useful purpose over the last ten years. My successor, Bernice Philbrick, is a long standing Trustee who has already proved herself as Company Secretary. I'm sure, assisted by our General Manager Sharon Trerise, she will make a great success of her new role and I leave her with my very best wishes for the future.

This has been a year of gradual recovery following the disastrous epidemic which affected every person and organisation in the country. I am gratified to say that Unite Carers weathered the storm thanks to the dedication of it's staff and volunteers, albeit with the loss of part of the scope of our operations which I will come to later.

After several zoom meetings the Board were finally able to meet face-to-face in April 2021.

Our support groups are now flourishing and thanks to the efforts of Jenny Towers we are now able to offer Safe Stop Sitting Service where carers can leave their loved ones for short periods while they attend to important domestic matters.

Our finances remain strong, although the indications are that going forward there will be a high level of competition for funds from the charitable trusts and foundations on which we rely for financial support. Donations are always very welcome and continue to be one of our sources of funding.

In the summer we learnt that Lara Pope, our Adult Services Manager, was leaving us for a job where she would be nearer to her beloved horses. We owe her our sincere thanks for 14 years of dedicated service to this charity and wish her every success and happiness in her new job. We were lucky enough to find an excellent replacement in Sarah Taft who has already proved her worth in the post and introduced her own ideas.

Sadly, things did not go so well on the young carers' side of the charity which operated under the heading of Kids Who Care. Here due to a series of problems relating to Covid, the Board came to the conclusion that we could no longer carry on with the service of respite for young carers provided through club nights and monthly outings. It is to be hoped that sometime in the future we may be in a position to restart our operations in this field.

Ex-Chairman of Trustees Annual Report (Continued)

While all this has been going on our involvement with Bright Futures has continued. Tracy Downs continued to do sterling work supporting young adult carers mostly through Teams, Zoom and socially distance contacts until the 21st August 2021 when the Bright Futures Upbeat Project came to an end. A new version has now started under the heading of Young Carers Connected which aims to support young carers between the ages of 8 and 25. Tracy is again involved as team leader and as a support worker.

Now after all the turmoil I'm pleased to say that things are beginning to get back to normal with volunteers returning to the fold and the demand for our support for adult carers continuing. At which point I would like to mention that the charity would very much welcome any newcomers who would like to volunteer and perhaps give something back to society so please get in touch if you're interested.

Roy Grantham (ex-Chair of Trustees)

Unite – Carers in Mid Devon

Positions as at 31st March 2022

Board of Trustees:

Bernice Philbrick
Chair of Trustees
Safeguarding Trustee
& Secretary

Patricia Eardley
Safeguarding Trustee

Jenny Baker
Trustee

Unite Carers Staff:

Sharon Trerise
General Manager

Sarah Taft
Volunteer Services Manager

Jenny Tower
Adult Carer Support Worker

Tracy Downs
YCC Support Worker

INCOME 2021/2022

Grants:

Allen Lane Foundation	£2,000.00
Ashfords Foundation	£7,000.00
Barbara Ward Children's Foundation	£3,000.00
Charles Hayward Foundation	£5,000.00
Crediton Town Council	£1,000.00
Devon County Council	£3,000.00
Edward Gostling Foundation	£5,000.00
Elmgrant Trust	£1,000.00
Forrester Trust	£5,000.00
H Trust	£1,000.00
Norman Trust	£1,000.00
Sir Jules Thor	£1,500.00
Sobell Foundation	£5,000.00
Tiverton Town Council	£500.00

Total Grants: **£41,000.00**

Donations:

Amazon Smile	£28.03
Brent Lodge	£300.00
Colebrook Church WI	£10.00
Co-operative	£732.68
E Currie	£10.00
In memory Carole Benn	£813.25
David Saunders	£114.00
DMCC Memory Café	£140.00
Donation Pot	£0.51
Inner Wheel, Tiverton	£200.00
Involve (for YCC)	£150.00
Jenny Marks	£40.00
Jenny Tower	£30.00
Lindy Spencer Barnard	£200.00
Mr & Mrs Fitzmaurice	£1,800.00
Mrs Wellswest	£100.00

Total Donations: **£4,668.47**

Contracts: **£14,884.31**

TOTAL INCOME: **£60,552.78**

Adult Carer Services AGM Report 2022

This part of the report was written by Jenny Tower in July 2022 ahead of her retirement on behalf of Sarah Taft who sadly had to resign due to ill health. Both were very involved on the Adult Carers side of Unite. Jenny's role was working with many of the groups, whilst Sarah supported adult carers and recruited and trained volunteers.

Numbers:

We currently have 45 active volunteers and almost 300 carers on our records, 30 are matched with volunteers for either face to face or telephone contact befriending. Many more attend the groups we provide.

Befriending:

Unite Carers "Befriending" Service is a major part of our operation. Carers are matched with one of our volunteers and receive support on a one to one basis either by telephone or at a chosen venue.

Groups:

Last year saw the start of our "Safe Stop Sitting Service". This group offers 2 ½ hrs respite for a carer whilst their 'cared for' is supervised and entertained by a qualified leader and experienced volunteers. It is held twice a month at Cherith Church Tiverton.

Other groups include the Forget Me Not Café for those with Dementia and their carers, several Oasis groups for carers of those with dementia and a number of general carers groups spread across Mid Devon.

Unfortunately, due to lack of volunteers, the carers group in Crediton closed earlier this year. We need to find more volunteers in that area.

The Parkinson Group has not re-established itself following Covid, but there are moves to get this up and running again soon.

We have revamped what was the Affinity groups for Parents of children with Special Educational Needs and now have two new groups – the Let's Unite Peer support group and the Let's Unite Outdoor group for families which is held at a local school in Tiverton.

All our groups are well attended. For further information about what we offer, please see the attached list or call the Unite office.

Counselling:

Counselling has been stopped on the whole for the foreseeable future due to problems in overseeing this regarding supervision and safeguarding issues.

Adult Carer Services AGM Report (Continued)

Newsletters:

These continue to go out regularly to both carers and volunteers keeping them abreast of what is going on at Unite Carers and to encourage communication.

Computer systems and validation:

During the time Sarah was with us, she updated our computer systems, including sourcing Microsoft Office 365, which will hopefully be up and running with very soon. She also did a great job of validating everyone listed on the database, assisted by an office volunteer, so we have clear records of all our carers and volunteers.

DBS checks:

All our volunteers now have up to date DBS checks, all have been safer recruited and have had induction training and other training required. Many have had reviews, but there are more to do this coming year.

Training:

All staff and Trustees completed GDPR training during the year. Staff also completed relevant safeguarding and first aid training.

Paperwork & Volunteer Handbook:

Sarah also revamped both the carers and volunteers' paperwork and edited the volunteer's handbook of information for their induction training.

Unite No 4 office:

Volunteers and staff have worked hard to clear out and tidy up our No 4 office in Bridge Street, Tiverton so that it can now be used for some groups – both Unite groups and available for other organisations to rent. Thank you to all who gave their time and helped with this.

Thank you:

This just leaves Unite Carers to say a great big THANK YOU to all our wonderful volunteers and Trustees as we could NOT do this without you. Please invite your friends along. We need more like you!!!

Best wishes

Jenny Tower

July 2022



Unite Carers Support Groups & Services 2022

Client Base	Group Name	Location	Day in the month	Time
All Carers	Cullompton Carers Coffee Group	The Hayridge Cullompton,	2nd Wednesday	10.30 am to 12 noon
All Carers	Bampton Oasis Group	The Swan, Bampton	1st Tuesday	10.30 am to 11.30 am
All Carers	Tiverton Carers Coffee Group	Riverside Club, Tiverton	4 th Tuesday	2 pm
All Carers & Ex-Carers	Uffculme Support Group	Various Locations	4 th Monday	12.30 pm
Cared-for	Safe Stop Sitting Service	Cherith Church, Tiverton	2 nd & 4 th Wednesday	10 am to 12.30 pm
Carers of Adults & Teenagers With Additional Needs	Carers of Adults & Teenagers With Additional Needs	Unite Carers 4 Bridge Street, Tiverton	3 rd Wednesday	10.30 am to 12 noon
Carers of Primary Age Children With Special Educational Needs	Let's Unite Outdoors	Wilcombe School, Tiverton	Seasonal contact Unite	
Carers of School Age Children With Special Educational Needs	Let's Unite Peer Support Group	Unite Carers 4 Bridge Street, Tiverton	1st Wednesday	9.30 am to 11.30 am
Dementia Carers	Culm Valley Oasis	Padbrook Park, Cullompton	3rd Monday	2.30 pm to 4.00 pm
Dementia Carers	Exe Valley Oasis	Riverside Club, Tiverton	2nd Thurs	2.00 pm
Dementia Carers & Cared-for	Forget-me-Not Cafe	Cherith Church, Tiverton	3rd Tuesday	2.00 pm to 3.30 pm

PLEASE CALL THE UNITE OFFICE FOR FURTHER DETAILS
01884 257511

AGM Report for Bright Futures and Young Carers Connected

1st April 2021 to 31st March 2022

As some of you may remember, Bright Futures Upbeat, our partnership project supporting young adult carers (YACs) came to an end on 31st August 2021 due to the project funding coming to an end after being extended for 13 months. At that time the Bright Futures project was closed with the hope that TTVS, the main contract holders in partnership with Unite would be able to secure more funding to begin a new project.

During that time, and throughout the covid pandemic, YACs supported by Bright Futures Upbeat benefitted from uninterrupted support both virtually and in person, with tailored 1:1 support and group activities and trips, in addition to family support, assessments and reviews and attendance at statutory meetings with Social Services and other agencies. Our weekly Live Chat group continued as a regular place for young adult carers to meet up with their friends and their Transition Workers to chat, share news and worries, in a safe space.

Fast forwards to 1st January 2022 and partial funding was secured by TTVS from the National Lottery for a new project – later to be named Young Carers Connected or, as it's more widely known, YCC.

YCC is a partnership between TTVS in Bideford, Unite Carers in Mid Devon, and Citizens Advice in Torridge, North, Mid and West Devon (CATNMWD) and is partially funded for 3 years by the National Lottery for specialist support workers for 12 hours a week for each locality in Mid Devon, North Devon and Torridge. YCC offers carer-specific support to young carers between the ages of 8 up to 24 years.

What we do at YCC to help young carers:

Assessment - An initial needs-based assessment with regular reviews. So far, we have registered 25 young people to YCC in Mid Devon with 3 YCs awaiting assessment. Our referrals for Mid Devon have predominantly been self-referrals from former Young Adult Carers with Bright Futures, with referrals for North Devon and Torridge coming from our networking sources including Carewise. All localities have received some referrals from information put out on our YCC Facebook page and website, from Devon Carers, schools and colleges and local authority statutory services.

Support – Every young carer is assigned a support worker with who they can build a strong, trusting relationship, right from the outset. We have decided to base our client lists on geographical location to help reduce staff travel costs and time, ensuring that the money we have in the project is spent supporting young people directly, so far as possible.

Planning and Mentoring – 1:1 mentoring support is accompanied by an Action Plan that is based on individual need. We meet with YCs to walk and talk, worries are shared over coffee and cake, and we work primarily face to face but also virtually with young carers and their families. Our Action Plans are time limited to either 3, 6, or 8 sessions to allow YCs to use the tools they have been given to move forward themselves and reducing the possibility of over-reliance. However, we also recognise that flexibility is equally important, and our plans can be extended and re-started when needed.

Continued/.....

Bright Futures and Young Carers Connected (Continued)

Family Support – family support is complimented by our direct access into Citizens Advice CATNMWD services, but also with the family work we do as Support Workers ourselves. For instance, access to support groups for their cared-for person, access to grants, advice, and information. We also offer activities for the whole family and had a wonderful event for families to celebrate the Jubilee together on 2nd June, working in collaboration with T100 and The Plough Arts Centre.

Advocacy - for young carers and attendance at TAF meetings, education meetings and other statutory meetings such as child protection meetings. I have also represented YCC at the Young Carers Monthly Steering Group in January, February, March, April and May 2022.

Access to training, information, and advice - through our social media platforms, the website, YouTube channel, Facebook page (with a private group for older young carers).

Ambassadors - Primarily a group of former young carers themselves who help to support young people directly through our activities, attendance at Steering Groups and promotional events – their approach based upon their own personal experiences as a young carer. We currently have 11 YCC Ambassadors and have recruited 5 new Ambassadors since February. Ambassadors have already been offered training sessions in County Lines/Cuckooing, and eMECC (making every contact count training) and all Ambassadors have received in-house induction training.

Respite Activities – Occasional trips and activities to give young people a break away from caring.

This year young carers with YCC have attend the following trips and activities:

16th March – The Young Carers Action Open Day at PETROC Campuses
25th March – The Plough Arts Centre Arts and Performance Arts Day
16th April – TTVS / YCC Skydive at Honiton Airfield
20th April – Young Carers Development Trust Employability Conference at City Hall, Bristol
1st May – Jubilee Arts Workshop – Batik – Theatre Performance – Life as a Young Carer
15th May – Jubilee Arts Workshop – Flags and Bunting - Theatre Performance – Life as a Young Carer
29th May – Jubilee Arts Workshop – Jubilee bonnets and crowns – Theatre Performance
2nd June – Carers Jubilee Celebration for all at the Plough Arts Centre – street party and performance
11th&12th July – Lundy Snorkelling Experience
19th&20th July – Lundy Snorkelling Experience
10th August – SS Freshspring – Mast climbing and activity day
13th August – Canoeing at Haven Banks

All our activities for young carers have been generously donated to us by local organisations and clubs. Our special thanks go to **The Plough Arts Centre, T100, The Plough Youth Theatre, The Young Carers Development Trust, Seaful, Easy Divers, The SS Freshspring and The Exeter Canoe Club**. We have received monetary donations from Waitrose, Sainsbury's and chocolate eggs from the Milky Way Adventure Park. I would also like to thank **Involve Mid Devon** who kindly donated £150 to YCC to help pay for promotional banners and materials for the new YCC project in Mid Devon. We cannot thank you enough for your generosity.

Tracy Downs

Temporary YCC Project Manager (Jan 2022 – June 2022) and Support Worker for Mid Devon



UNITE CARERS IN MID DEVON KIDS WHO CARE ANNUAL REPORT 2021 to 2022

The Kids Who Care project was put on hold along with the rest of the country when we went into lockdown in March 2020. I returned from furlough to my KWC role on 1st June 2021. During the furlough period my colleague Tracy had taken up a full time position on the Bright Futures project so we recruited to fill the position. During the recruitment process I got in contact with our KWC volunteers and venues regarding their availability for club nights and trips.

I also supported Devon Young Carers on a trip to the Bear Trail in Cullompton and took a small number of young carers to the Northcott Theatre to see Treasure Island in August with the help of two of our volunteers.

We worked closely with Devon Young Carers in attempting to get our club nights and trips back up and running. We were asked to work with newly registered young carers who were identified as needing our support rather than the young carers on our existing database. It proved difficult to get engagement from the new young carers that were unknown to us despite sending out letters and consent forms, followed up by emails and telephone calls.

As covid struck again in the form of Omicron many of our volunteers were shielding and unfortunately our Board of Trustees had to make the very difficult decision to close the project.

We hope that in the near future this very worth-while project will rise from the ashes of Covid and we can once again support our young carers in Mid Devon.

Sharon Trerise

UNITE - CARERS IN MID DEVON
FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

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CHARITY NUMBER 1099188
COMPANY NUMBER 04779388

UNITE - CARERS IN MID DEVON
REFERENCE AND ADMINISTRATION DETAILS

Registered charity number	1099188
Company number	04779388
Charity's principal address	2 Bridge Street Tiverton Devon EX16 5LY
Trustees	Bernice Philbrick (Chair) (appointed February 2022) Pat Eardley Jenny Baker Tina Webber (appointed June 2022) Roy Grantham (resigned March 2022)
Independent examiner	Mrs M Hutchings Aspen Waite South West Chartered Accountants 21 Bampton Street Tiverton Devon EX16 6AA
Bankers	CAF Bank Limited PO Box 289 West Malling Kent ME19 4TA

**UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022**

The Trustees present their report and the financial statements of the charity for the year ended 31 March 2022. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

OBJECTIVES AND ACTIVITIES

Summary of the objects of the charity set out in its governing document

To promote any charitable purpose for the benefit of unpaid Carers of any age who look after someone who depends upon them in the Mid Devon area, by the advancement of education, the protection of health and the relief of poverty, sickness and distress.

Summary of the main activities in relation to these objectives

Unite Carers provides advice - face to face, by telephone and by e-mail from the Tiverton office. Unite Carers' volunteers visit Carers at home to provide "befriending" support and can also provide regular telephone support calls and transport for essential journeys as well as IT support and a group sitting service to allow carers to get respite from their caring role. A specialist "Forget Me Not" cafe for people with dementia and their Carers operates once a month in Tiverton. "Oasis" peer support groups for carers of people with dementia are held monthly in Tiverton and Cullompton. Other general and specialist Carer Support Groups run every month in various locations to provide carers with the opportunities for peer support such as the Let's Unite Peer Support and Outdoor Groups which supports families with children with autism.

The charity currently has 45 trained volunteers who help to provide our services and who are vital to Unite Carers. The contribution they make in supporting Carers is invaluable: Supporting the office, helping with Carers' groups, sending out invitations, providing lifts, helping with Young Carer activities, acting as first-stage mentors, phoning Carers at home for a friendly chat and visiting Carers to provide social support and practical assistance. The charity also supports Ex-Carers groups in Tiverton.

The Trustees have had regard to the Charity Commission guidance on public benefit and believe this is achieved via the charity's objectives and activities.

ACHIEVEMENTS AND PERFORMANCE

Summary of the main achievements of the charity during the year

Our staff returned to full working hours in June 2021 and we are pleased that our befriending services and support groups are fully up and running, and in some cases expanding. At the end of the year, we had almost 300 Carers on our Database. All receive our Newsletters, the majority by e-mail.

Support for Adult Carers – Volunteer support continues, with Carers benefiting from home-visits, meeting for coffee or receiving telephone support services as well as support groups, IT and bereavement support.

Support Groups have continued to provide respite breaks and opportunities for Carers to encourage each other in Tiverton, Cullompton and Uffculme.

The 'Forget Me Not' Cafe is held monthly in Tiverton with increasing support and numbers. People with dementia and their Carers are able to enjoy a pleasant social afternoon with tea, cakes and chat and help and advice, with support from a Devon Carers Ambassador and sometimes with chats from professionals.

The "Oasis" support groups, for dementia carers, are held monthly in Tiverton, Cullompton and Bampton. We hold Support groups for all carers in Tiverton, Cullompton and Uffculme. We are also pleased to continue to support the monthly Ex-Carers Lunch.

Young Carers and Bright Futures Projects

The "Kids Who Care" project ran respite activities for Young Carers in Mid Devon providing monthly club nights in Tiverton, Crediton and Cullompton, with monthly trips offered to Young Carers whose support needs are prioritised by Devon Carers. This project ended in November 2021.

Unite were one of the four partners making up the Bright Futures Upbeat consortium which is funded by the Big Lottery and supports Young Adult Carers between the ages of 18 and 25. As part of the scheme Unite employed a Transitions Worker who concentrates efforts on youngsters in the Mid Devon area. The scheme ended in August 2021. In January 2022 'Young Carers Connected' was launched working in partnership with TTVS in Bideford and Citizens Advice Bureau working with carers aged 8 to 24 with their families.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022

Sitting service

Due to the pandemic we were unable to provide a home sitting service. We therefore launched our Safe Stop Sitting Service in October 2021 which is held twice a month in Tiverton. Carers are able to leave their loved ones for 2.5 hours whilst our volunteers provide activities and refreshments.

Publicity and Promotion

We welcome invitations to promote our services for Carers and during this year we have continued to work with other groups to provide information stands at local events.

Further Development

We run specific training courses for volunteers wishing to support Adult Carers. We continue to strengthen our services to Carers through the further development of our team of volunteers and expansion of our groups and services. Our staff receive appropriate updated training for their roles.

FINANCIAL REVIEW**Result for the year**

The financial statements show net deficit for the year of £17,025 (2021: net surplus of £10,808).

Restricted funds at the year end total £12,682 (2021: £31,414).

Designated funds at the year end total £39,836 (2021: £33,117)

Unrestricted funds at the year end total £14,680 (2021: £19,692)

Brief summary of the charity's policy on reserves

Sufficient funds should be always available, equivalent to at least six months of operational costs to meet all commitments and allow for effective transition of Carer support, should the need arise. Unite holds no fixed property assets and all other assets (equipment, etc.) are written off in the year of purchase.

STRUCTURE, GOVERNANCE AND MANAGEMENT**Type of governing document**

Memorandum and Articles of Association

How the charity is constituted

Company limited by Guarantee

Additional governance Issues

Trustees are invited to serve from existing volunteers who are usually Carers, ex-Carers or supporters of the organisation. We are obliged to have at least one third of our trustees as experienced Carers as we need to ensure that our organisation is truly 'Carer-led'. Potential trustees meet with the Chair and another trustee for a discussion about the role, the charity, its objectives and its position to date, plus an idea of what is expected of them. If the candidate is still interested they will be asked to attend a trustee meeting as an observer and thereafter, both parties being in favour, will be voted onto the Board. All new Trustees are asked to visit the Charities Commission website and thoroughly read 'The Essential Trustee' which describes the roles and responsibilities of Trustees as well as undertake on-line training for new trustees. They will receive a Volunteers handbook at the time of joining Unite which contains much useful information. In accordance with the Charity Commission's requirements, the Trustees have reviewed the risks to which the organisation might be exposed and have created a Risk Register. This register is reviewed and updated every year prior to the annual reporting process.

OTHER OPTIONAL INFORMATION

Unite Carers currently do not have a Treasurer therefore Trustees receive monthly feedback from the General Manager regarding the Charity's financial status and funding application situation which is discussed openly at the monthly Trustee meetings so that reasonable and prudent decisions on the charity's funding and expenditure may be made.

We receive no direct local or central funding to support our operations and rely mainly on grants from charitable trusts and foundations. We are lucky enough to be in receipt of a number of donations from local individuals and organisations. Funding Unite's operations is challenging due to the current economic crisis and after effects of COVID.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022

Statement of trustees' responsibilities

The trustees (who are also directors of Unite – Carers In Mid Devon for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Account Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2015 (FRS 102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared taking advantage of the small companies exemption of Section 415A of the Companies Act 2006.

Approval

This report was approved by the board of Directors and Trustees on 2nd Sept. 2022
and signed on its behalf.

..... B Philbrick

MRS B PHILBRICK (CHAIR)

**INDEPENDENT EXAMINERS REPORT TO THE TRUSTEES
ON THE UNAUDITED FINANCIAL STATEMENTS OF
UNITE - CARERS IN MID DEVON**

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 March 2022 which are set out on pages 6 to 12.

Respective responsibilities of trustees and examiner

As the charity trustees of the company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act'),

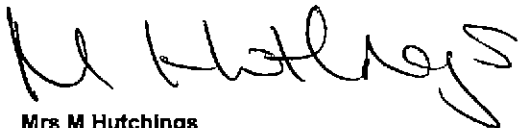
Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for Independent examination, I report in respect of my examination of your company's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records are not kept in respect of the company as required by section 386 of the 2006 Act; or
- 2 accounting records do not accord with those records; or
- 3 the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
- 4 the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



**Mrs M Hutchings
Aspen Walte South West
Chartered Accountants**

**21 Bampton Street
Tiverton EX16 6AA**

Date: 05/04/2022

UNITE - CARERS IN MID DEVON
STATEMENT OF FINANCIAL ACTIVITIES
(INCORPORATING INCOME AND EXPENDITURE ACCOUNT)
YEAR TO 31 MARCH 2022

Notes	Unrestricted	Designated	Restricted	Total 2022	Total 2021
	£	£	£	£	£
Income and endowments from:					
Donations and legacies	12,756	29,173	18,624	60,553	70,113
Interest	24	-	-	24	222
CJRS grants	2,260	478	962	3,700	27,754
Other Income	-	-	550	550	-
Total income and endowments	15,040	29,651	20,136	64,827	98,090
Expenditure on:					
Charitable activities	2 34,395	21,791	25,666	81,852	87,282
Total expenditure	34,395	21,791	25,666	81,852	87,282
Net income / (expenditure) before transfers	(19,355)	7,860	(5,530)	(17,025)	10,808
Transfers between funds	14,343	(1,141)	(13,202)	-	-
Net income / (expenditure) after transfers	(5,012)	6,719	(18,732)	(17,025)	10,808
Fund balances at 1 April 2021	19,692	33,117	31,414	84,223	73,415
Fund balances at 31 March 2022	14,680	39,836	12,682	67,198	84,223

The notes on pages 8 to 12 form part of these financial statements.

UNITE - CARERS IN MID DEVON
BALANCE SHEET
31 MARCH 2022

	Notes	£	2022 £	£	2021 £
Non-current assets					
Tangible Fixed assets	7		-		-
Current assets					
Debtors	8	453		361	
Cash at bank and in hand		69,006		85,651	
		<u>69,459</u>		<u>86,012</u>	
Creditors: Amounts falling due within one year	9	<u>2,261</u>		<u>1,789</u>	
Total assets less current liabilities			<u>67,198</u>		<u>84,223</u>
Net assets			<u><u>67,198</u></u>		<u><u>84,223</u></u>
Income funds					
Restricted funds	10		12,682		31,414
Unrestricted funds					
Designated funds	11		39,836		33,117
Other charitable funds			<u>14,680</u>		<u>19,692</u>
			<u><u>67,198</u></u>		<u><u>84,223</u></u>

For the year ending 31 March 2022 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its accounts for the year in question in accordance with Section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on.....*2nd Sept 2022*
and signed on their behalf by:

B. Philbrick
.....
MRS B PHILBRICK (CHAIR)

The notes on pages 8 to 12 form part of these financial statements.

Company number 04779388

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

1 Accounting policies

1.1 General information and basis of preparation

Unite - Carers in Mid Devon is a Private Limited Company by guarantee and Charity registered in England within the United Kingdom.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (as updated through Update Bulletin 1 published on 2 February 2016), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015.

The charity has applied Update Bulletin 1 as published on 2 February 2016 and does not include a cash flow statement on the grounds that it is applying FRS 102 Section 1A

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

Following the global impact of 'COVID-19', at the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

1.2 Funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statements.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Income recognition

All incoming resources are included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the charity and it is probable that they will be fulfilled.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

Investment income represents bank interest and is accounted for when received.

Government grants are recognised at the fair value of the asset received or receivable when there is reasonable assurance that the grant conditions will be met and the grants will be received.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

1.4 Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings:

- Costs of raising funds;
- Expenditure on charitable activities; and
- Other expenditure represents those items not falling into the categories above.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

1.5 Tangible fixed assets and depreciation

Depreciation is provided at rates calculated to write off the cost less residual value of each asset over its expected useful life, as follows;

Computer equipment - 1 year straight line

1.6 Debtors and creditors receivable / payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

1.7 Cash

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.8 Pensions

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

2. Analysis of expenditure on charitable activities

	Unrestricted	Designated	Restricted	2022	2021
	£	£	£	£	£
Staff and Contract Salaries	18,127	18,727	22,167	59,021	69,599
Pension	725	501	828	2,054	2,647
Staff expenses	93	404	1,305	1,802	766
Training	392	60	180	632	40
Volunteers expenses	236	938	403	1,577	721
Trustee expenses	-	-	-	-	142
Rent and room hire	6,983	575	125	7,683	4,950
Rates	254	-	-	254	209
Light, heat and power	(144)	-	-	(144)	1,764
Insurance	361	-	-	361	390
Repairs and renewals	802	-	-	802	-
Printing, postage and stationery	556	99	-	655	310
Advertising	833	50	-	883	30
Telephone	1,504	100	208	1,812	1,993
Accountancy fees	1,737	-	-	1,737	3,533
Professional fees	1,246	-	-	1,246	171
Sundry expenses	594	32	-	626	103
Bank charges	96	-	-	96	64
Carers Outings	-	-	276	276	161
Subscriptions	-	-	-	-	10
Depreciation	-	305	174	479	-
	<u>34,395</u>	<u>21,791</u>	<u>25,666</u>	<u>81,852</u>	<u>87,282</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

3. Independent examiners fees	2022	2021
	£	£
Preparation of monthly payroll including furlough claims	597	1,777
Software training and assistance	-	256
Preparation of statutory accounts	840	1,200
Examination fee	300	300
	<u>1,737</u>	<u>3,533</u>
4. Trustees' emoluments	2022	2021
	£	£
Trustees remuneration	Nil	Nil
Expenses reimbursed - various expenses	825	142
	<u>825</u>	<u>142</u>
Number of trustees to whom expenses were reimbursed	<u>2</u>	<u>1</u>
5. Staff costs and employee benefits	2022	2021
	£	£
Wages and salaries	59,021	68,103
Social Security	-	1,496
Defined contribution pension costs	2,054	2,647
	<u>61,075</u>	<u>72,246</u>
Redundancy payments	-	-
	<u>-</u>	<u>-</u>
The average number of employees during the year was	<u>3</u>	<u>4</u>
No employee received emoluments above £60,000		
6. Pension Costs		
The company operated a defined contribution pension scheme in respect of employees. The scheme and its assets are held by independent managers. The pension charge represents contributions due from the company and amounted to £2,054 (2021: £2,647)		
7. Tangible fixed assets		
	Computer Equipment	
	£	
Cost		
At 1 April 2021	1,011	
Additions	479	
Disposals	-	
At 31 March 2022	<u>1,490</u>	
Depreciation		
At 1 April 2021	1,011	
Charge for the Year	479	
Eliminated on disposal	-	
At 31 March 2022	<u>1,490</u>	
Net Book Value		
At 31 March 2021	<u>-</u>	
At 31 March 2022	<u>-</u>	
8. Debtors: amounts falling due within one year	2022	2021
	£	£
Trade debtors	-	-
Prepayments	453	361
	<u>453</u>	<u>361</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

9. Creditors: amounts falling due within one year	2022	2021
	£	£
Trade creditors	775	50
Other taxes and social security	670	1,291
Other creditors	816	448
	<u>2,261</u>	<u>1,789</u>

10. Restricted funds	2021	Incoming	Outgoing	Transfers	2022
	£	£	£	£	£
KWC Project	20,720	4,096	11,614	(13,202)	-
Bright Futures / Young Carers Connected	7,341	15,034	11,764	-	10,611
Sitting Service	3,353	1,006	2,288	-	2,071
	<u>31,414</u>	<u>20,136</u>	<u>25,666</u>	<u>(13,202)</u>	<u>12,682</u>

Restricted funds	2020	Incoming	Outgoing	Transfers	2021
	£	£	£	£	£
KWC Project	22,720	17,139	13,954	(5,185)	20,720
Bright Futures Project 2 Upbeat	2,379	28,804	23,842	-	7,341
Sitting Service	3,951	5,263	5,861	-	3,353
	<u>29,050</u>	<u>51,206</u>	<u>43,657</u>	<u>(5,185)</u>	<u>31,414</u>

KWC Project - This project was supported by Westbank with a small contribution towards the running costs for Monthly Club Nights and Outings. Other funding comes from donations and from grants through Charitable Trusts and Foundations. The project came to an end in December 2021.

Bright Futures/Young Carers Connected - Specialist Support for Young Carers and Young Adult Carers (Aged 18 - 25 years old).

Sitting service - A dedicated sitting service under the auspices of Westbank which allows carers to get out of the house for short periods with volunteers stepping in.

11. Designated funds

The income funds include the following designated funds which have been set aside out of unrestricted funds by the directors for specific purposes

	2021	New Designations	Utilised	Transfers	2022
	£	£	£	£	£
Carers support group	462	440	5,642	4,878	138
Volunteer Support for Adult Carers	32,655	29,211	16,149	(6,019)	39,698
	<u>33,117</u>	<u>29,651</u>	<u>21,791</u>	<u>(1,141)</u>	<u>39,836</u>

	2020	New Designations	Utilised	Transfers	2021
	£	£	£	£	£
Carers support group	-	545	83	-	462
Volunteer Support for Adult Carers	19,129	35,997	17,601	(4,870)	32,655
	<u>19,129</u>	<u>36,542</u>	<u>17,684</u>	<u>(4,870)</u>	<u>33,117</u>

Carer Support Groups – This funding is for the running of Support Groups throughout Mid Devon including the Forget-Me-Not Cafe and Oasis groups for the carers of people with memory difficulties.

Volunteer Support for Adult Carers - This funding is for the volunteer support to Adult Carers including befriending, telephone outreach, bereavement and essential journeys support.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

12. Analysis of net assets between funds

	Unrestricted funds	Restricted funds	Total funds
Fund balances at 31 March 2022 are represented by:			
	£	£	£
Current assets	56,777	12,682	69,459
Current liabilities	(2,261)	-	(2,261)
	<u>54,516</u>	<u>12,682</u>	<u>67,198</u>

13. Related party transactions

There have been no related party transactions in the year.

UNITE - CARERS IN MID DEVON
FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

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Balance sheet	7
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CHARITY NUMBER 1099188
COMPANY NUMBER 04779388

UNITE - CARERS IN MID DEVON
REFERENCE AND ADMINISTRATION DETAILS

Registered charity number	1099188
Company number	04779388
Charity's principal address	2 Bridge Street Tiverton Devon EX16 5LY
Trustees	Bernice Philbrick (Chair) (appointed February 2022) Pat Eardley Jenny Baker Tina Webber (appointed June 2022) Roy Grantham (resigned March 2022)
Independent examiner	Mrs M Hutchings Aspen Waite South West Chartered Accountants 21 Bampton Street Tiverton Devon EX16 6AA
Bankers	CAF Bank Limited PO Box 289 West Malling Kent ME19 4TA

**UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022**

The Trustees present their report and the financial statements of the charity for the year ended 31 March 2022. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

OBJECTIVES AND ACTIVITIES

Summary of the objects of the charity set out in its governing document

To promote any charitable purpose for the benefit of unpaid Carers of any age who look after someone who depends upon them in the Mid Devon area, by the advancement of education, the protection of health and the relief of poverty, sickness and distress.

Summary of the main activities in relation to these objectives

Unite Carers provides advice - face to face, by telephone and by e-mail from the Tiverton office. Unite Carers' volunteers visit Carers at home to provide "befriending" support and can also provide regular telephone support calls and transport for essential journeys as well as IT support and a group sitting service to allow carers to get respite from their caring role. A specialist "Forget Me Not" cafe for people with dementia and their Carers operates once a month in Tiverton. "Oasis" peer support groups for carers of people with dementia are held monthly in Tiverton and Cullompton. Other general and specialist Carer Support Groups run every month in various locations to provide carers with the opportunities for peer support such as the Let's Unite Peer Support and Outdoor Groups which supports families with children with autism.

The charity currently has 45 trained volunteers who help to provide our services and who are vital to Unite Carers. The contribution they make in supporting Carers is invaluable: Supporting the office, helping with Carers' groups, sending out invitations, providing lifts, helping with Young Carer activities, acting as first-stage mentors, phoning Carers at home for a friendly chat and visiting Carers to provide social support and practical assistance. The charity also supports Ex-Carers groups in Tiverton.

The Trustees have had regard to the Charity Commission guidance on public benefit and believe this is achieved via the charity's objectives and activities.

ACHIEVEMENTS AND PERFORMANCE

Summary of the main achievements of the charity during the year

Our staff returned to full working hours in June 2021 and we are pleased that our befriending services and support groups are fully up and running, and in some cases expanding. At the end of the year, we had almost 300 Carers on our Database. All receive our Newsletters, the majority by e-mail.

Support for Adult Carers – Volunteer support continues, with Carers benefiting from home-visits, meeting for coffee or receiving telephone support services as well as support groups, IT and bereavement support.

Support Groups have continued to provide respite breaks and opportunities for Carers to encourage each other in Tiverton, Cullompton and Uffculme.

The 'Forget Me Not' Cafe is held monthly in Tiverton with increasing support and numbers. People with dementia and their Carers are able to enjoy a pleasant social afternoon with tea, cakes and chat and help and advice, with support from a Devon Carers Ambassador and sometimes with chats from professionals.

The "Oasis" support groups, for dementia carers, are held monthly in Tiverton, Cullompton and Bampton. We hold Support groups for all carers in Tiverton, Cullompton and Uffculme. We are also pleased to continue to support the monthly Ex-Carers Lunch.

Young Carers and Bright Futures Projects

The "Kids Who Care" project ran respite activities for Young Carers in Mid Devon providing monthly club nights in Tiverton, Crediton and Cullompton, with monthly trips offered to Young Carers whose support needs are prioritised by Devon Carers. This project ended in November 2021.

Unite were one of the four partners making up the Bright Futures Upbeat consortium which is funded by the Big Lottery and supports Young Adult Carers between the ages of 18 and 25. As part of the scheme Unite employed a Transitions Worker who concentrates efforts on youngsters in the Mid Devon area. The scheme ended in August 2021. In January 2022 'Young Carers Connected' was launched working in partnership with TTVS in Bideford and Citizens Advice Bureau working with carers aged 8 to 24 with their families.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022

Sitting service

Due to the pandemic we were unable to provide a home sitting service. We therefore launched our Safe Stop Sitting Service in October 2021 which is held twice a month in Tiverton. Carers are able to leave their loved ones for 2.5 hours whilst our volunteers provide activities and refreshments.

Publicity and Promotion

We welcome invitations to promote our services for Carers and during this year we have continued to work with other groups to provide information stands at local events.

Further Development

We run specific training courses for volunteers wishing to support Adult Carers. We continue to strengthen our services to Carers through the further development of our team of volunteers and expansion of our groups and services. Our staff receive appropriate updated training for their roles.

FINANCIAL REVIEW

Result for the year

The financial statements show net deficit for the year of £17,025 (2021: net surplus of £10,808).

Restricted funds at the year end total £12,682 (2021: £31,414).

Designated funds at the year end total £39,836 (2021: £33,117)

Unrestricted funds at the year end total £14,680 (2021: £19,692)

Brief summary of the charity's policy on reserves

Sufficient funds should be always available, equivalent to at least six months of operational costs to meet all commitments and allow for effective transition of Carer support, should the need arise. Unite holds no fixed property assets and all other assets (equipment, etc.) are written off in the year of purchase.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Type of governing document

Memorandum and Articles of Association

How the charity is constituted

Company limited by Guarantee

Additional governance Issues

Trustees are invited to serve from existing volunteers who are usually Carers, ex-Carers or supporters of the organisation. We are obliged to have at least one third of our trustees as experienced Carers as we need to ensure that our organisation is truly 'Carer-led'. Potential trustees meet with the Chair and another trustee for a discussion about the role, the charity, its objectives and its position to date, plus an idea of what is expected of them. If the candidate is still interested they will be asked to attend a trustee meeting as an observer and thereafter, both parties being in favour, will be voted onto the Board. All new Trustees are asked to visit the Charities Commission website and thoroughly read 'The Essential Trustee' which describes the roles and responsibilities of Trustees as well as undertake on-line training for new trustees. They will receive a Volunteers handbook at the time of joining Unite which contains much useful information. In accordance with the Charity Commission's requirements, the Trustees have reviewed the risks to which the organisation might be exposed and have created a Risk Register. This register is reviewed and updated every year prior to the annual reporting process.

OTHER OPTIONAL INFORMATION

Unite Carers currently do not have a Treasurer therefore Trustees receive monthly feedback from the General Manager regarding the Charity's financial status and funding application situation which is discussed openly at the monthly Trustee meetings so that reasonable and prudent decisions on the charity's funding and expenditure may be made.

We receive no direct local or central funding to support our operations and rely mainly on grants from charitable trusts and foundations. We are lucky enough to be in receipt of a number of donations from local individuals and organisations. Funding Unite's operations is challenging due to the current economic crisis and after effects of COVID.

UNITE - CARERS IN MID DEVON
REPORT OF THE TRUSTEES
YEAR TO 31 MARCH 2022

Statement of trustees' responsibilities

The trustees (who are also directors of Unite – Carers In Mid Devon for the purposes of company law) are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Account Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2015 (FRS 102);
- make judgments and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared taking advantage of the small companies exemption of Section 415A of the Companies Act 2006.

Approval

This report was approved by the board of Directors and Trustees on 2nd Sept. 2022
and signed on its behalf.

B Philbrick

MRS B PHILBRICK (CHAIR)

**INDEPENDENT EXAMINERS REPORT TO THE TRUSTEES
ON THE UNAUDITED FINANCIAL STATEMENTS OF
UNITE - CARERS IN MID DEVON**

I report to the charity trustees on my examination of the accounts of the company for the year ended 31 March 2022 which are set out on pages 6 to 12.

Respective responsibilities of trustees and examiner

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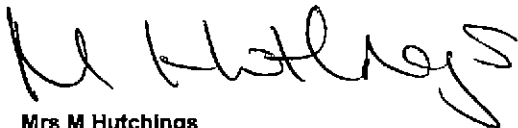
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Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records are not kept in respect of the company as required by section 386 of the 2006 Act; or
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**Mrs M Hutchings
Aspen Walte South West
Chartered Accountants**

**21 Bampton Street
Tiverton EX16 6AA**

Date: 05/04/2022

UNITE - CARERS IN MID DEVON
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(INCORPORATING INCOME AND EXPENDITURE ACCOUNT)
YEAR TO 31 MARCH 2022

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Expenditure on:					
Charitable activities	2 34,395	21,791	25,666	81,852	87,282
Total expenditure	34,395	21,791	25,666	81,852	87,282
Net income / (expenditure) before transfers	(19,355)	7,860	(5,530)	(17,025)	10,808
Transfers between funds	14,343	(1,141)	(13,202)	-	-
Net income / (expenditure) after transfers	(5,012)	6,719	(18,732)	(17,025)	10,808
Fund balances at 1 April 2021	19,692	33,117	31,414	84,223	73,415
Fund balances at 31 March 2022	14,680	39,836	12,682	67,198	84,223

The notes on pages 8 to 12 form part of these financial statements.

UNITE - CARERS IN MID DEVON
BALANCE SHEET
31 MARCH 2022

	Notes	£	2022 £	£	2021 £
Non-current assets					
Tangible Fixed assets	7		-		-
Current assets					
Debtors	8	453		361	
Cash at bank and in hand		69,006		85,651	
		<u>69,459</u>		<u>86,012</u>	
Creditors: Amounts falling due within one year	9	<u>2,261</u>		<u>1,789</u>	
Total assets less current liabilities			<u>67,198</u>		<u>84,223</u>
Net assets			<u><u>67,198</u></u>		<u><u>84,223</u></u>
Income funds					
Restricted funds	10		12,682		31,414
Unrestricted funds					
Designated funds	11		39,836		33,117
Other charitable funds			<u>14,680</u>		<u>19,692</u>
			<u><u>67,198</u></u>		<u><u>84,223</u></u>

For the year ending 31 March 2022 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its accounts for the year in question in accordance with Section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on.....*2nd Sept 2022*
and signed on their behalf by:

B. Philbrick
.....
MRS B PHILBRICK (CHAIR)

The notes on pages 8 to 12 form part of these financial statements.

Company number 04779388

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

1 Accounting policies

1.1 General information and basis of preparation

Unite - Carers in Mid Devon is a Private Limited Company by guarantee and Charity registered in England within the United Kingdom.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (as updated through Update Bulletin 1 published on 2 February 2016), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice as it applies from 1 January 2015.

The charity has applied Update Bulletin 1 as published on 2 February 2016 and does not include a cash flow statement on the grounds that it is applying FRS 102 Section 1A

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the charity and rounded to the nearest £.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

1.2 Going concern

Following the global impact of 'COVID-19', at the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

1.2 Funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statements.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes. The cost of raising and administering such funds are charged against the specific fund. The aim and use of each restricted fund is set out in the notes to the financial statements.

1.3 Income recognition

All incoming resources are included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the charity and it is probable that they will be fulfilled.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

Investment income represents bank interest and is accounted for when received.

Government grants are recognised at the fair value of the asset received or receivable when there is reasonable assurance that the grant conditions will be met and the grants will be received.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

1.4 Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings:

- Costs of raising funds;
- Expenditure on charitable activities; and
- Other expenditure represents those items not falling into the categories above.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

1.5 Tangible fixed assets and depreciation

Depreciation is provided at rates calculated to write off the cost less residual value of each asset over its expected useful life, as follows;

Computer equipment - 1 year straight line

1.6 Debtors and creditors receivable / payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

1.7 Cash

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts.

1.8 Pensions

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

2. Analysis of expenditure on charitable activities

	Unrestricted	Designated	Restricted	2022	2021
	£	£	£	£	£
Staff and Contract Salaries	18,127	18,727	22,167	59,021	69,599
Pension	725	501	828	2,054	2,647
Staff expenses	93	404	1,305	1,802	766
Training	392	60	180	632	40
Volunteers expenses	236	938	403	1,577	721
Trustee expenses	-	-	-	-	142
Rent and room hire	6,983	575	125	7,683	4,950
Rates	254	-	-	254	209
Light, heat and power	(144)	-	-	(144)	1,764
Insurance	361	-	-	361	390
Repairs and renewals	802	-	-	802	-
Printing, postage and stationery	556	99	-	655	310
Advertising	833	50	-	883	30
Telephone	1,504	100	208	1,812	1,993
Accountancy fees	1,737	-	-	1,737	3,533
Professional fees	1,246	-	-	1,246	171
Sundry expenses	594	32	-	626	103
Bank charges	96	-	-	96	64
Carers Outings	-	-	276	276	161
Subscriptions	-	-	-	-	10
Depreciation	-	305	174	479	-
	<u>34,395</u>	<u>21,791</u>	<u>25,666</u>	<u>81,852</u>	<u>87,282</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

3. Independent examiners fees	2022	2021
	£	£
Preparation of monthly payroll including furlough claims	597	1,777
Software training and assistance	-	256
Preparation of statutory accounts	840	1,200
Examination fee	300	300
	<u>1,737</u>	<u>3,533</u>
4. Trustees' emoluments	2022	2021
	£	£
Trustees remuneration	Nil	Nil
Expenses reimbursed - various expenses	825	142
	<u>825</u>	<u>142</u>
Number of trustees to whom expenses were reimbursed	<u>2</u>	<u>1</u>
5. Staff costs and employee benefits	2022	2021
	£	£
Wages and salaries	59,021	68,103
Social Security	-	1,496
Defined contribution pension costs	2,054	2,647
	<u>61,075</u>	<u>72,246</u>
Redundancy payments	-	-
The average number of employees during the year was	<u>3</u>	<u>4</u>
No employee received emoluments above £60,000		
6. Pension Costs		
The company operated a defined contribution pension scheme in respect of employees. The scheme and its assets are held by independent managers. The pension charge represents contributions due from the company and amounted to £2,054 (2021: £2,647)		
7. Tangible fixed assets		
	Computer Equipment	
	£	
Cost		
At 1 April 2021	1,011	
Additions	479	
Disposals	-	
At 31 March 2022	<u>1,490</u>	
Depreciation		
At 1 April 2021	1,011	
Charge for the Year	479	
Eliminated on disposal	-	
At 31 March 2022	<u>1,490</u>	
Net Book Value		
At 31 March 2021	<u>-</u>	
At 31 March 2022	<u>-</u>	
8. Debtors: amounts falling due within one year	2022	2021
	£	£
Trade debtors	-	-
Prepayments	453	361
	<u>453</u>	<u>361</u>

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

9. Creditors: amounts falling due within one year	2022	2021
	£	£
Trade creditors	775	50
Other taxes and social security	670	1,291
Other creditors	816	448
	<u>2,261</u>	<u>1,789</u>

10. Restricted funds	2021	Incoming	Outgoing	Transfers	2022
	£	£	£	£	£
KWC Project	20,720	4,096	11,614	(13,202)	-
Bright Futures / Young Carers Connected	7,341	15,034	11,764	-	10,611
Sitting Service	3,353	1,006	2,288	-	2,071
	<u>31,414</u>	<u>20,136</u>	<u>25,666</u>	<u>(13,202)</u>	<u>12,682</u>

Restricted funds	2020	Incoming	Outgoing	Transfers	2021
	£	£	£	£	£
KWC Project	22,720	17,139	13,954	(5,185)	20,720
Bright Futures Project 2 Upbeat	2,379	28,804	23,842	-	7,341
Sitting Service	3,951	5,263	5,861	-	3,353
	<u>29,050</u>	<u>51,206</u>	<u>43,657</u>	<u>(5,185)</u>	<u>31,414</u>

KWC Project - This project was supported by Westbank with a small contribution towards the running costs for Monthly Club Nights and Outings. Other funding comes from donations and from grants through Charitable Trusts and Foundations. The project came to an end in December 2021.

Bright Futures/Young Carers Connected - Specialist Support for Young Carers and Young Adult Carers (Aged 18 - 25 years old).

Sitting service - A dedicated sitting service under the auspices of Westbank which allows carers to get out of the house for short periods with volunteers stepping in.

11. Designated funds

The income funds include the following designated funds which have been set aside out of unrestricted funds by the directors for specific purposes

	2021	New Designations	Utilised	Transfers	2022
	£	£	£	£	£
Carers support group	462	440	5,642	4,878	138
Volunteer Support for Adult Carers	32,655	29,211	16,149	(6,019)	39,698
	<u>33,117</u>	<u>29,651</u>	<u>21,791</u>	<u>(1,141)</u>	<u>39,836</u>

	2020	New Designations	Utilised	Transfers	2021
	£	£	£	£	£
Carers support group	-	545	83	-	462
Volunteer Support for Adult Carers	19,129	35,997	17,601	(4,870)	32,655
	<u>19,129</u>	<u>36,542</u>	<u>17,684</u>	<u>(4,870)</u>	<u>33,117</u>

Carer Support Groups – This funding is for the running of Support Groups throughout Mid Devon including the Forget-Me-Not Cafe and Oasis groups for the carers of people with memory difficulties.

Volunteer Support for Adult Carers - This funding is for the volunteer support to Adult Carers including befriending, telephone outreach, bereavement and essential journeys support.

UNITE - CARERS IN MID DEVON
NOTES TO THE FINANCIAL STATEMENTS
YEAR ENDED 31 MARCH 2022

12. Analysis of net assets between funds

	Unrestricted funds	Restricted funds	Total funds
Fund balances at 31 March 2022 are represented by:			
	£	£	£
Current assets	56,777	12,682	69,459
Current liabilities	(2,261)	-	(2,261)
	<u>54,516</u>	<u>12,682</u>	<u>67,198</u>

13. Related party transactions

There have been no related party transactions in the year.